



# REPORTING STANDARDS

## Consumer Magazines

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## INTRODUCTION

This document contains the Reporting Standards for print and digital copies of products registered in the Consumer Magazines sector.

The PDF versions of the Reporting Standards are issued at a certain point in time. As Reporting Standards are updated periodically, please check the website <https://www.abc.org.uk/reporting-standards> to ensure you are using the latest applicable standards and to access any available guidance notes.

Each category of circulation in the Reporting Standards has the following:

- Definition
- Principles
- Requirements
- Reporting

If you are after a quick understanding of the key points of any section then the definition and principles will provide an overview.

If you have any queries regarding how the Reporting Standards affect you or any specific queries please contact the ABC Client services team on 01442 870 800 or email [enquiries@abc.org.uk](mailto:enquiries@abc.org.uk).

## GENERAL PRINCIPLES AND RECORD KEEPING

### INTRODUCTION

This section sets out some key requirements relating to the overall reporting and auditing of your ABC claim.

### PRINCIPLES

1. **The publication must be eligible to report under the Reporting Standards**
2. **Copies must comply with the Reporting Standards**
3. **Transactions related to the claim must be bona fide ‘arm’s length’ arrangements**
4. **Evidence to support the claim must be retained and available for a minimum period**
5. **There is a designated Audit Issue**

### REQUIREMENTS

1. **The publication must be eligible to report under the Reporting Standards**
  - a) You may apply to register a print or digital publication under the Consumer Magazine Reporting Standards.
2. **Copies must comply with the Reporting Standards**
  - a) Copies claimed must comply with the relevant sections of these Reporting Standards with the following exceptions which you specifically cannot claim:
    - i. Free copies to contributors
    - ii. Free copies to advertisers
    - iii. Free copies to advertising agencies. Note: You may claim controlled or non-controlled free circulation to advertising agencies providing the publication relates to the running of the agency business. *For example: an office equipment magazine.*
    - iv. Free copies to press cutting agencies
    - v. File or office copies
    - vi. Free publisher employee copies
    - vii. Paid publisher employee copies (unless they qualify under the Paid Employee Copies category or they are purchased as a normal consumer).
3. **Transactions related to the claim must be bona fide ‘arm’s length’ arrangements**
  - a) Transactions or arrangements (such as sales, circulation or distribution services) with your own organization or Related Parties will initially be deemed as not bona fide ‘arms-length’ for ABC purposes, meaning they cannot be included in your claim. However, they can be included if you are able to demonstrate to the satisfaction of ABC (and your auditor, if applicable) that these comply with the Reporting Standards and are bona fide ‘arm’s length’ arrangements.
  - b) Related Parties for ABC purposes will include where:
    - i. One party has direct or indirect control of the other party; or
    - ii. The parties are subject to common control from the same source; or

- iii. One party has influence over the financial & operating policies of the other party to an extent that the other party might be inhibited from pursuing at all times its own separate interests; or
- iv. The parties, in entering a transaction, are subject to influence from the same source to such an extent that one of the parties to the transaction has subordinated its own separate interests.
- v. Transactions between contract publishers and their clients are deemed not to be arm's length in relation to a specific publication produced for that client.

This means the following are considered Related Parties for ABC purposes:

- The publisher, its subsidiary, parent and fellow undertakings (and Directors of these)
- Associates and Joint Ventures (and their investors)

#### **4. Evidence to support the claim must be retained and available for a minimum period**

- a) You must retain and be able to provide all records supporting the claim, including but not limited to:
  - i. An analysis of the claim by issue.
  - ii. Evidence supporting the number of copies printed for each issue claimed.
  - iii. Evidence supporting the number of copies distributed for each issue claimed, relevant to its circulation type.
  - iv. Evidence for each copy supporting the relevant circulation category and geographical region in which it is claimed on an issue by issue basis (i.e. not on a transactional basis).
  - v. A copy of each issue and any Editions claimed.
  - vi. A copy of each Multipack claimed must be retained.
  - vii. Financial records.
- b) Records supporting the claim must be retained until we have completed the audit of the certificate for the subsequent corresponding Reporting Period. *For example, the records supporting the July to December 2025 period must be retained until we have completed the audit for July to December 2026.* If you use another Approved Auditor that is already in place as at 1<sup>st</sup> January 2025, you must retain the records until you receive the certificate for the subsequent corresponding Reporting Period.
- c) Records supporting the claim must be retained and made available to your Auditor or ABC on request, in accordance with the ABC Byelaws.

#### **5. There is a designated Audit Issue**

- a) The Audit Issue is a designated issue in the Reporting Period for which the Reporting Standards specify certain information is required to be retained or reported. If there are exceptional circumstances affecting the use of the designated Audit Issue, please contact us for advice.
- b) For 6 or 12-month Reporting Periods ending December the Audit Issue is the issue distributed nearest to the end of September and for Reporting Periods ending June the issue distributed nearest to the end of March (Note: For weekly publications exclude the seven days either side of Easter).
  - i. If two issues are equidistant from this date then you may choose either as the Audit Issue.
- c) For any other reporting Periods the Audit Issue is the issue distributed nearest to the first day of the last month in the Reporting Period, which also falls within the Reporting Period.
  - i. If two issues are equidistant from this date then you may choose either as the Audit Issue.

## REPORTED DATA

### INTRODUCTION

This section sets out other data and information that is reported on the ABC Certificate.

### REQUIREMENTS

#### 1. Total Average Circulation

You must report the total Average Circulation per issue analysed into UK & Republic of Ireland, and Other Countries, broken out by print and Digital Copy (as appropriate), as shown below. Please refer to relevant section for more details.

Primary categories	Circulation categories eligible	Additional analysis
Paid Single Copies	Retail Sales: Sale or return Firm Sale Single Copy Sales	Multipack analysis
Paid Subscriptions	Single Copy Subscriptions All You Can Read Sales Multiple Subscriptions	
Membership Copies	Membership Copies	
Paid Multiple Copies	Paid Multiple Copies	
Free Copies	Controlled Free Free Requested Non-Controlled Free Free Pick Up Free Retail Voucher Free Letterbox	Free Pick Up by type if 20% or more of total circulation

#### 2. Print and digital copies circulated to the same individual

- a) You may claim a print copy and a digital copy for an issue that are circulated to the same individual in the circulation analysis and total ABC circulation. This includes the following scenarios, where the individual is known and identifiable:
  - i. A sale or subscription of both a print and digital copy to the same individual (whether as a single transaction – ‘a bundled/package sale’ or separate transactions)
  - ii. A free print copy and a paid digital copy to the same individual
  - iii. A paid print copy and a free digital copy to the same individual
  - iv. A free print copy and a free digital copy to the same individual
- b) If you include print and digital copies of an issue to the same individual in your claim, as noted in (a) above, you must report the average number of individuals that received both a print and digital copy per issue in the total average circulation for the period. This will appear as a note on the certificate and in ABC data.
  - i) Where the details of the individual are not known because the circulation category’s requirements do not require it, then these copies do not need to be accounted for in the note. *Examples include retail sales, Free Pick Up, Free Letterbox or circulation where you use a bespoke distribution process that we have agreed to waive the requirement for the individuals’ details to be provided.*

#### 3. Duplicate copies

- a) With the exception noted in point 2 above, you cannot claim duplicate print copies or duplicate digital copies to a known individual unless there is a category available to report them (for example Multiple Subscriptions, Paid Multiple Copies). Note:

- i. A duplicate print copy or duplicate digital copy is defined as two or more occurrences of the same name, or company name (where the addressee is not identified by name or job title) or address unless it can be shown that the copies are distributed to different individuals.

#### 4. Actively Purchased Circulation

- a) We will report an analysis of the paid element of the total Average Circulation which is defined as Actively Purchased, being the sum of circulation from the following categories:
  - i. Paid Single Copies (Retail and Single Copy Sales)
  - ii. Paid Subscriptions – Individual (Single Copy Subscriptions and All You Can Read Sales)

The Actively purchased circulation will be analysed by print and Digital Copies by UK & ROI, and Other Countries.

#### 5. Issue details, circulations and variances

- a) You must report for each issue in the Reporting Period the issue identifier. *For example, cover date, issue number*
- b) We will report the percentage variance of any issue's total circulation from the average circulation, where this is greater than 10%.
- c) You must report additional issue circulation figures as follows:
  - i. For publications publishing fewer than 18 issues in a calendar year, for each issue:
    - The issue's identifier and its total circulation\*, analysed by print and digital circulation.
    - The issue's actively purchased circulation and purchased percentage.
  - ii. For publications publishing 18 or more issues in a calendar year:
    - The number of issues distributed/made available in each month (determined as detailed in the section 'Issues to be Included').
    - The average of the total circulations\* of those issues distributed in each month, analysed by print and digital circulation.
    - The average actively purchased circulation of those issues distributed in each month together with the average actively purchased percentage.

\*Not including any adjustments for differences between estimated and actual sales for previous periods (means these breakdowns may not equate exactly to total average circulation).

#### 6. You may choose to report a Group or Series Certificate

- a) You may choose to report an optional Group Certificate that combines the circulations from 2 or more publications' Certificates providing:
  - i. Each Certificate relates to the same Reporting Standards
  - ii. Each Certificate is for the same Reporting Period

Note:

  - You may include publications with different publishing frequencies
  - ABC will produce Group Certificates from the data submitted for the constituent publications.
- b) You may choose to report a Certificate for a Series of Publications where:
  - i. There is evidence that the publications form part of a series and that they are not 'one-shots' which require separate certification.

- ii. Each publication is clearly identified as part of the series by the use of a common series logo or appropriate strapline on the front cover.

**7. Optional analyses**

- a) You may request to report additional analyses, derived from (or closely connected with) data reported on the certificate, subject to the following:
  - i. The data to be reported on the certificate is, in our opinion:
    - o Auditable
    - o Clear (terms defined or explained as appropriate)
    - o Related to the product being certified
    - o Albeit reporting different information, is in keeping with the requirements for data and evidence in relation to the current Reporting Standards. *For example: if the breakout is an analysis of subscription bundles, we would expect the evidence levels to be in line with that already in place for subscriptions.*
  - ii) We will review the request and confirm whether we agree it can be reported, how it will be reported and any requirements in relation to the audit of timing or process.

Note: There may be additional costs associated with the preparation of the certificate and audit of the additional data.

## PAID SINGLE COPIES

### Retail Sales (Sale or Return) [Print/Digital]

#### DEFINITION

A copy sold to a retailer, on a sale or return basis, for resale as a single copy to a consumer.

#### PRINCIPLES

1. **Single copy knowingly paid for by the consumer to the retailer**
2. **Copies are purchased from the publisher by the retailer, on a sale or return basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
3. **It must be clear that the price paid by the consumer includes the publication**
4. **There must be an incentive for unsold copies/net sale to be reported to the publisher**
5. **If the final net sale is not known then estimates must be made**

#### REQUIREMENTS

1. **Single copy knowingly paid for by the consumer to the retailer**

- a) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
- b) The consumer must pay at least minimum legal tender per copy.
- c) Back issues up to 12 months old can be claimed against the issue current at the time of sale.
- d) Multipacked (or banded) magazines (Print only):

A magazine is defined for ABC purposes as being sold as part of a Multipack (i.e. where it is packaged or banded together as a unit with other issues or publications) only if two or more publications in that pack are included in an ABC circulation claim.

i. **Only one publication claimed**

If only one publication that is sold as part of a package is to be included in an ABC circulation claim, ('the lead title') then the sale of the pack will be treated for ABC purposes as the sale of just that publication. Note:

- It must be clear from the pack itself which publication is the lead title (i.e. the one which can be included in an ABC claim).
- The lead title cannot be a back issue or promoted as 'free'.

ii. **Two or more publications claimed**

- Sales of Multipacks must be separately and clearly identified on newstrade reports and documentation.
- If a magazine in the pack is a back issue (with the exception of repurposed copies – see below) or is at all promoted as 'free' then it cannot be claimed as a sold copy for ABC purposes

Note:

- A free publication (or one promoted as free) included in the multipack may be eligible to be claimed as Free Pick Up. Please refer to the appropriate section for requirements and reporting. If a publication is claimed as a free copy within a retail multipack it must be detailed on the multipack breakout for the paid publication.

e) **Repurposed unsold print retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies in a Multipack as follows:

- Issues up to 12 months old against the issue current at the time of sale/distribution.
- If the repurposed copy is sold together with a copy (or copies) of a different publication(s) then at least one copy in the Multipack must be the current issue.
- If the repurposed copy is sold in a Multipack together with a current issue of the same publication, then the price paid for the multipack must exceed the current issue's cover price by at least:
  - i) 20% of the current issue's cover price; or
  - ii) £1 (whichever is the lower).
- The quantity of repurposed copies included in your claim must be reported – see the Reporting section below for details.

**2. Copies are purchased from the publisher by the retailer, on a sale or return basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**

- a) 'Sale or Return' means unsold copies are returned or reported for credit. The copies claimed will therefore be the net sale (copies supplied less credited copies). Note: Copies reported using a pay on scan system will be reported in this category. You will need to ensure appropriate records of sales are available for audit.
- b) Where the publisher is not third party to the retailer then evidence of purchase by the consumer is required. *For example, EPOS reports and retailer revenues.*
- c) You must account for net sales on an issue by issue basis.
- d) Retail sales of Digital Copies via a third-party retailer (*for example Apple Newsstand, Google, Amazon etc*) will be reported in this category. However, copies sold as part of a multi-title package where access to a wide range of different Digital Copies is available to the consumer must be claimed in the All You Can Read category providing the requirements of that category are met.

**3. It must be clear that the price paid by the consumer includes the publication**

- a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the retailer and any cash they paid for the voucher.
- b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
  - i. Cash reimbursements to the consumer must be taken into account.
  - ii. If the publication is promoted to the consumer as free, then it cannot be claimed as a paid sale.
- c) You must retain details of promotional or special offers during the reporting period.

**4. There must be an incentive for unsold copies/net sale to be reported to the publisher**

No additional requirements

**5. If the final net sale is not known then estimates must be made**

- a) If at the time you submit your circulation claim unsold copies could still be returned or reported, you must make an estimate of final sales claim. You must adjust your claim in the following period to reflect any difference between the estimated net sale and the actual net sale
- b) In relation to promotional schemes utilising voucher redemption: If the effect of not making an estimate is judged to be unlikely to affect the figures claimed by more than 2% of the total average circulation then you can account for the vouchers on a wash through basis (i.e. as they are redeemed).

## REPORTING

You will report retail sales as follows, which will be broken out on the ABC Certificate:

- 1. By print and digital copies, by total average retail sales (combined with single copy sales) over the period, by geographical type:

- a) United Kingdom and Republic of Ireland
  - b) Other Countries
2. Publications must report issues sold as part of a multipack by:
- a) Identifying the other publication(s) in the multipack
  - b) Listing only publications that are part of an ABC circulation claim (could be either Retail Sale or Free Pick Up)
  - c) Specifying the quantity and percentage of each issue's Paid Single Copies (total retail sales and single copy sales) sold in the multipack
3. For Multipacks Using Repurposed Unsold Retail Copies:
- a) Calculate and report the percentage of repurposed Multipack copies as a proportion of Actively Purchased circulation
  - b) Combine all repurposed copies (from Multipacks and other categories)
  - c) Report the total repurposed copies as a percentage of average total circulation

## PAID SINGLE COPIES

### Retail Sales (Firm Sale) [Print/Digital]

#### DEFINITION

A copy sold to a retailer, on a firm sale basis, intended for resale as a single copy to a consumer.

#### PRINCIPLES

1. **Single copy made available for purchase by the consumer from the retailer**
2. **Copies are purchased from the publisher by the retailer, on a firm sale basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**
3. **It must be clear that the price paid by the consumer includes the publication**
4. **The retailers' ability to vary supply must not be unduly restricted**

#### REQUIREMENTS

1. **Single copy made available for purchase by the consumer from the retailer**

- a) Contractual arrangement with the retailer must make clear that copies are for resale to the consumer.
- b) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
- c) The consumer must pay at least minimum legal tender per copy.
- d) Multipacked (or banded) magazines (Print only):

A magazine is defined for ABC purposes as being sold as part of a Multipack (i.e. where it is packaged or banded together as a unit with other issues or publications) only if two or more publications in that pack are included in an ABC circulation claim.

i. **Only one publication claimed**

If only one publication that is sold as part of a package is to be included in an ABC circulation claim, ('the lead title') then the sale of the pack will be treated for ABC purposes as the sale of just that publication. Note:

- It must be clear from the pack itself which publication is the lead title (i.e. the one which can be included in an ABC claim).
- The lead title cannot be a back issue or promoted as 'free'.

ii. **Two or more publications claimed**

- Sales of Multipacks must be separately and clearly identified on newstrade reports and documentation.
- If a magazine in the pack is a back issue or is at all promoted as 'free' then it cannot be claimed as a sold copy for ABC purposes.

Note:

- A free publication (or one promoted as free) included in the multipack may be eligible to be claimed as Free Pick Up. Please refer to the appropriate section for requirements and reporting. If a publication is claimed as a free copy within a retail multipack it must be detailed on the multipack breakout for the paid publication.

- e) You cannot claim back issue sales to the retailer.

2. **Copies are purchased from the publisher by the retailer, on a firm sale basis, either direct or via the distribution chain (typically distributor and/or wholesaler)**

- a) 'Firm sale' means that unsold copies are not returned or reported for credit.

- b) You must account for sales on an issue by issue basis.

**3. It must be clear that the price paid by the consumer includes the publication**

- a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the retailer and any cash they paid for the voucher.
- b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
  - i. Cash reimbursements to the consumer must be taken into account.
- c) You must retain details of promotional or special offers during the reporting period.
- d) Copies sold to the retailer can be claimed as retail sales unless there is evidence to the contrary, in which case claims should be adjusted as follows:
  - i. The retailer distributes copies free to the consumer (these should be removed from claim)
  - ii. The consumer makes full payment using a voucher from a publisher-controlled promotion (these should be removed from the claim).

For the avoidance of doubt: copies disposed of by the retailer (not sold to a consumer) do not need to be deducted.

**4. The retailers' ability to vary supply must not be unduly restricted**

No additional requirements.

**REPORTING**

You will report retail sales as follows, which will be broken out on the ABC Certificate:

- 1. By print and digital copies, by total average retail sales (combined with single copy sales) over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland;
  - b) Other Countries
- 2. Publications must report issues sold as part of a multipack by:
  - a) Identifying the other publication(s) in the multipack
  - b) Listing only publications that are part of an ABC circulation claim (could be either Retail Sale or Free Pick Up)
  - c) Specifying the quantity and percentage of each issue's Paid Single Copies (total retail sales and single copy sales) sold in the multipack
- 3. For Multipacks Using Repurposed Unsold Retail Copies:
  - a) Calculate and report the percentage of repurposed Multipack copies as a proportion of Actively Purchased circulation
  - b) Combine all repurposed copies (from Multipacks and other categories)
  - c) Report the total repurposed copies as a percentage of average total circulation

## PAID SINGLE COPIES

### Single Copy Sales [Print/Digital]

#### DEFINITION

A single copy sold to a consumer direct by the publisher.

#### PRINCIPLES

1. **Single copy knowingly paid for by the consumer**
2. **Copies are purchased direct from the publisher**
3. **It must be clear that the price paid by the consumer includes the publication**

#### REQUIREMENTS

1. **Single copy knowingly paid for by the consumer**

- a) The purchase by the consumer may be in cash or by other means agreed by ABC in writing.
- b) The consumer must pay at least minimum legal tender per copy.
- c) Back issues up to 12 months old can be claimed against the issue current at the time of sale.
- d) Multipacked (or banded) magazines (Print only):

A magazine is defined for ABC purposes as being sold as part of a Multipack (i.e. where it is packaged or banded together as a unit with other issues or publications) only if two or more publications in that pack are included in an ABC circulation claim.

i. **Only one publication claimed**

If only one publication that is sold as part of a package is to be included in an ABC circulation claim, ('the lead title') then the sale of the pack will be treated for ABC purposes as the sale of just that publication. Note:

- It must be clear from the pack itself which publication is the lead title (i.e. the one which can be included in an ABC claim).
- The lead title cannot be a back issue or promoted as 'free'.

ii. **Two or more publications claimed**

- Sales of Multipacks must be separately and clearly identified on newstrade reports and documentation.
- If a magazine in the pack is a back issue (with the exception of repurposed copies – see below) or is at all promoted as 'free' then it cannot be claimed as a sold copy for ABC purposes

Note:

- A free publication (or one promoted as free) included in the multipack may be eligible to be claimed as Free Pick Up. Please refer to the appropriate section for requirements and reporting. If a publication is claimed as a free copy within a retail multipack it must be detailed on the multipack breakout for the paid publication.

e) **Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies in a Multipack as follows:

- Issues up to 12 months old against the issue current at the time of sale/distribution.
- If the repurposed copy is sold together with a copy (or copies) of a different publication(s) then at least one copy in the Multipack must be the current issue.

- If the repurposed copy is sold in a Multipack together with a current issue of the same publication, then the price paid for the multipack must exceed the current issue's cover price by at least:
  - i) 20% of the current issue's cover price; or
  - ii) £1 (whichever is the lower).
- The quantity of repurposed copies included in your claim must be reported – see the Reporting section below for details.

**2. Copies are purchased direct from the publisher**

- a) You must account for sales on an issue by issue basis.

**3. It must be clear that the price paid by the consumer includes the publication**

- a) If a voucher from a publisher-controlled promotion is used the amount paid by the consumer is deemed to be the total of the cash paid to the publisher and any cash they paid for the voucher.
- b) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
  - i. Cash reimbursements to the consumer must be taken into account.
  - ii. If the publication is promoted to the consumer as free, then it cannot be claimed as a paid sale.
- c) You must retain details of promotional or special offers during the reporting period.

## REPORTING

You will report single copy sales as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies, by total single copy sales (combined with retail sales) over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland;
  - b) Other Countries
2. Publications must report issues sold as part of a multipack by:
  - a) Identifying the other publication(s) in the multipack
  - b) Listing only publications that are part of an ABC circulation claim (could be either Retail Sale or Free Pick Up)
  - c) Specifying the quantity and percentage of each issue's Paid Single Copies (total retail sales and single copy sales) sold in the multipack
3. For Multipacks Using Repurposed Unsold Retail Copies:
  - a) Calculate and report the percentage of repurposed Multipack copies as a proportion of Actively Purchased circulation
  - b) Combine all repurposed copies (from Multipacks and other categories)
  - c) Report the total repurposed copies as a percentage of average total circulation

## PAID SUBSCRIPTIONS

### Single Copy Subscription Sales [Print/Digital]

#### DEFINITION

A single copy sold and distributed to an individual or organisation for a contracted period.

#### PRINCIPLES

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
2. **Single copy per issue, distributed to a known addressee**
3. **Single copy knowingly paid for by the subscriber**
4. **For a contracted period and for a minimum number of issues (at least two)**
5. **It must be clear that the price paid by the consumer includes the publication**

#### REQUIREMENTS

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
  - a) You must be able to provide evidence of the contractual arrangements between the subscriber and the publisher (or their agent) including the issues/period and the price.
  - b) If you merge publications or purchase a subscription list from a ceased publication it must be clear that subscribers have made a choice to receive the publication claimed.
  - c) Retail subscriptions (where the purchaser buys a subscription at a retail outlet and is given a unique code that enables a subscription to be activated) can be claimed as long as:
    - i. They are sold through a third-party retailer.
    - ii. Each retail subscription has a unique activation code.
    - iii. The retailer supplies reports identifying how many retail subscriptions have been sold and the price.
    - iv. You can demonstrate the number and prices of retail subscriptions both purchased and activated to support the claim.
    - v. They have been activated and distributed.

We will consider auditable alternative retail subscription schemes but you will need our approval in advance.

2. **Single copy per issue, distributed to a known addressee**
  - a) You must be able to demonstrate the copy is distributed to the addressee.
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
3. **Single copy knowingly paid for by the subscriber**

- a) The subscriber must be the addressee except:
  - i. Where the addressee is an employee whose employer is the subscriber.
  - ii. Where the addressee is the recipient of a gift subscription from the subscriber (maximum 12 gift subscriptions per subscriber). The recipient's geographical location for reporting purposes may be treated as being the same as that of the purchaser making the gift.
- b) The purchase by the subscriber may be in cash or by other means agreed by ABC in writing.
- c) You can claim copies where payment is outstanding as long as there are reasonable grounds to consider them to be live, good and collectable.

**4. For a contracted period and for a minimum number of issues (at least two)**

- a) You can claim back issues:
  - i. Where a subscriber has specifically requested back issues as part of their subscription term:
    - For up to 3 months preceding the issue current when the subscriber is first added to the mailing list for UK and Republic of Ireland addressees.
    - For up to 6 months preceding the issue current when the subscriber is first added to the mailing list for addressees in other countries.
  - ii. Where a subscriber has not been specifically notified via the subscription offer that back issues will be part of their subscription term:
    - For weekly publications: For up to 2 issues immediately preceding the issue current when the subscriber is first added to the mailing list.
    - For non-weekly publications: only 1 issue immediately preceding the issue current when the subscriber is first added to the mailing list.

**5. It must be clear that the price paid by the consumer includes the publication**

- a) You can ignore the value (or perceived value) of any gifts, or other incentives. However:
  - i. Cash reimbursements to the consumer must be taken into account.
  - ii. If the publication is promoted to the consumer as free, then it cannot be claimed as a paid sale.
- b) You must retain details of promotional or special offers during the reporting period.

## REPORTING

You will report single copy subscription sales as follows, which will be broken out on the ABC Certificate:

- 1. By print and digital copies, by total average single copy subscription sales over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland;
  - b) Other Countries

## PAID SUBSCRIPTIONS

### All You Can Read Sales [Digital only]

#### DEFINITION

A Digital Copy that a consumer has purchased and viewed as part of a multi-publication package.

#### PRINCIPLES

1. **Copy is paid for and viewed by the consumer**
2. **There must be a contractual arrangement between any third-party intermediaries/sellers and the publisher to purchase the copies**
3. **If the final paid for and viewed figure is not known then estimates can be made**

#### REQUIREMENTS

1. **Copy is paid for and viewed by the consumer**
  - a) The consumer has paid for the right to view the copy as part of a multi-publication package. *Note: Although the consumer may subscribe to the multi-publication package for a contracted period, the copies are not treated as subscriptions but claimed on a single-issue basis when viewed.*
  - b) Copies can only be claimed if they have been viewed by a consumer. This will be demonstrated by meeting at least the definition of a Publication Active View (a single copy of a publication actively opened by a device for viewing - see full definition below).
  - c) Only one view per device per issue can be claimed
  - d) There is no requirement to de-duplicate it against other circulation categories
  - e) Back issues up to 12 months old can be claimed against the issue current at the time it is viewed

#### Definition: Publication Active View:

1. Definition: A single copy of a publication actively opened by a device for viewing.
2. Principles:
  - a. A minimum of one page of an issue opened/served on/to a device.
    - i. Note: A device may make a number of active views of an issue, either together or at different times. Only one active view per device per issue can be claimed and reported
  - b. Distinct action/event by the end user to view.
    - i. Note: a single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
  - c. The view request must be on an issue by issue basis.
2. **There must be a contractual arrangement between any third-party intermediaries/sellers and the publisher to purchase the copies**
  - a) Where third-parties are used you must be able to provide:

- i. Evidence of payment to the publisher and between any other intermediaries for the copies claimed
- ii. Evidence of the contractual arrangements between the publisher and any other intermediaries to measure, report and pay the publisher for the copies claimed.

**3. If the final paid for and viewed figure is not known then estimates can be made**

- a) If at the time you submit your circulation claim you have good reason to believe further copies will be paid for and viewed (for example based on historical trends) then you may make an estimate of final sales.
- b) You must adjust your claim in the following period to reflect any difference between the estimated claim and the actual figure.

## **REPORTING**

You will report All You Can Read Sales as follows, which will be broken out on the ABC Certificate:

1. By digital copies, by total average All You Can Read Sales over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland
  - b) Other Countries

## PAID SUBSCRIPTIONS

### Multiple Copy Subscription Sales [Print/Digital]

#### DEFINITION

More than one copy purchased by a known subscriber for a contracted period with the intention to distribute to the same group of individuals over the term of the subscription.

#### PRINCIPLES

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
2. **Must be likely copies are received by the same individual(s) over the term of the subscription**
3. **Copies are paid for by the subscriber**
4. **For a contracted period and for a minimum number of issues (at least two)**

#### REQUIREMENTS

1. **There must be a contractual arrangement between the subscriber and the publisher (or their agent)**
  - a) You must be able to provide evidence of the contractual arrangements between the subscriber and the publisher (or their agent) including the issues/period, the quantities to be supplied and the price.
2. **Must be likely copies are received by the same individual(s) over the term of the subscription**
  - a) You must be able to demonstrate, through the distribution method, that the copies are likely to be distributed to the same individual(s) over the subscription term. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
3. **Copies are paid for by the subscriber**
  - a) You can claim copies where payment is outstanding as long as there are reasonable grounds to consider them to be live, good and collectable.
4. **For a contracted period and for a minimum number of issues (at least two)**
  - a) You cannot claim distribution of back issues.

#### REPORTING

You will report multiple copy subscription sales as follows, which will be broken out on the ABC Certificate:

1. By print and digital copies, by total average multiple copy subscription sales over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland;
  - b) Other Countries

## PAID MULTIPLE COPIES

### Multiple Copy Sales [Print/Digital]

#### DEFINITION

Copies purchased by a third party from the publisher, delivered and made available for pick up or receipt by consumers.

#### PRINCIPLES

1. **There must be a contractual arrangement between the final purchaser (third party) and the publisher or an intermediary**
2. **Copies are paid for by the final purchaser**
3. **The publisher must receive a positive financial contribution per copy from the final purchaser**
4. **Copies distributed and made available for pick up or receipt by consumers**
5. **Claimed quantity should not exceed potential demand by the intended consumers**

#### REQUIREMENTS

1. **There must be a contractual arrangement between the final purchaser (third party) and the publisher or an intermediary**
  - a) You must be able to provide evidence of the contractual arrangements between the final purchaser and the publisher and/or the intermediary (if applicable) including the issues, quantities to be supplied and price per copy.
  - b) You cannot claim sales of back issues (with the exception of repurposed unsold retail copies and digital copies reported using active views – see below).

##### **Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.
  - ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.
2. **Copies are paid for by the final purchaser**
    - a) The net price paid must be at least minimum legal tender per copy.
  3. **The publisher must receive a positive financial contribution per copy from the final purchaser**
    - a) Either the final purchaser or intermediary (if applicable) must pay the publisher a net amount for the copies:
      - i. When calculating what price has been paid you must take into account:
        - Any reciprocal payments made by the publisher
        - Any reciprocal charges for goods or services made by the purchaser (or the intermediary if applicable) as part of the deal (*for example: for distribution or marketing*).
        - The value of any other goods or services provided free or discounted by the publisher (*for example advertising or promotional messages*).

- ii. In the case of print airline and international rail copies, sold for distribution in secure areas airside and trackside, it is recognised that an authorised distribution company must be used. In this scenario:
  - If that distribution company is used as an intermediary to sell to the final purchaser, the publisher may not receive a net payment for the copies from the distribution company due to the payment of distribution charges.
  - If a distributor pays a contractual entry fee to the final purchaser which is of a general basis and not specific to any specified group of publications or publishers then this will not be considered a reciprocal payment to be taken into account for ABC purposes.

**4. Copies distributed and made available for pick up or receipt by consumers**

- a) You must be able to demonstrate that the copies are distributed and made available for pick up or receipt by the intended consumers.
- b) For a digital copy:
  - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
  - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - iii. Distribution of the copy to a consumer may be demonstrated via a report of active views, which contains sufficient means of excluding repeated views by the same device/user. If based on active views, you may claim back issues up to 12 months old against the issue current at the time it is viewed.
  - iv. There is no requirement to de-duplicate these copies against other circulation categories.

**5. Claimed quantity should not exceed potential demand by the intended consumers**

- a) The claim for a multiple copy sale where the copies are distributed via the newstrade as part of a multipack with another publication must be restricted to the number actually sold on the newstrade (i.e. the claim will not be not the gross quantity purchased under the bulk sale deal).
- b) In other situations, you must be able to demonstrate that the claimed quantity would not exceed the potential demand by the intended consumers.
- c) Copies purchased by a consumer, wholly or in part by coupon(s) obtained via a promotion controlled by a party independent of the publisher, can be claimed (on a sale or return basis) providing:
  - i. The Publisher has no control over the conversion of coupons into cash, (i.e. coupon redemption must be direct between the retailer of the Publication and the independent promoter or their agent)
  - ii. The final number of copies that may be claimed will be based upon the number of copies that can be proven by the redemption of vouchers and amount paid. Note: As the copies may have been initially supplied via the newstrade, care must be taken not to double count these copies in the circulation claim.

**REPORTING**

You will report multiple copy sales as follows, which will be broken out on the ABC Certificate:

- 1. By print and digital copies, by total average multiple copy sales over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland
  - b) Other Countries
- 2. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## MEMBERSHIP COPIES [Print/Digital]

### DEFINITION

A single copy of an official Society publication distributed to a member of that society.

*Note: 'Society' throughout this section refers to the Society, Association or Organisation as appropriate.*

### PRINCIPLES

1. **The publication is an official publication of the Society**
2. **Single copy of an issue distributed to an individual who is a member of the Society (or an employee nominated under a corporate society membership)**

### REQUIREMENTS

1. **The publication is an official publication of the society**
  - a) You must be able to provide evidence that the publication is:
    - i. An official publication of the Society; or
    - ii. Circulated as a member benefit of the Society
2. **Single copy distributed to an individual who is a member of the Society (or an employee nominated under a corporate society membership)**
  - a) Corporate members are members of the Society (companies or organisations) who pay the membership fee or fees and nominate employees as recipients of the publication. These recipients may be claimed as Society circulation.
  - b) Evidence of the individual's Society membership (or organisation's corporate membership and nominated employees) must be available.
  - c) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - d) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
  - e) You cannot claim distribution of back issues.

### REPORTING

1. You will report Membership Copies as follows, which will be broken out on the ABC Certificate:

- a) By print and digital copies, by total average Membership Copies over the period, by geographical type:
  - i. United Kingdom and Republic of Ireland
  - ii. Other Countries
2. The Society/Societies' name(s) will also be reported on the ABC Certificate.

## FREE COPIES

### Controlled Free [Print/Digital]

#### DEFINITION

Copies sent free to a defined group of individuals.

#### PRINCIPLES

1. **Single copy per issue, distributed to an individual.**
2. **Individual falls within defined criteria (Terms of Control)**
3. **Individual's details supported by third party evidence that is less than five years old**
4. **Copies may be requested or non-requested**

#### REQUIREMENTS

1. **Single copy per issue, distributed to an individual**
  - a) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
    - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a new route to market that is operated by a third party or partner operation under the following conditions:
      - You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
      - You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
      - We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Controlled Circulation and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
      - You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
  - c) You cannot claim distribution of back issues (with the exception of repurposed unsold retail copies – see below).

#### **Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.
- ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.

## 2. Individual falls within defined criteria (Terms of Control)

- a) The publisher sets the Terms of Control, complying with the following:
  - i. The wording must be clear and relate to individuals not companies
  - ii. Phrases or words that are subjective and/or difficult to explicitly prove are not permitted.
  - iii. There must be at least one qualifying demographic which is neither:
    - a geographic criteria at a country level or higher (*for example individuals in the UK*); or
    - an interest in the field (*for example individuals with an interest in technology*).
  - iv. It must be possible for individuals not to meet the criteria.
- b) You must not publish either the Terms of Control or an approximation of these in the publication or on any documents or promotional material targeted at the reader where the effect might be to lead them to provide inaccurate data about themselves in order to meet the Terms of Control.

## 3. Individual's details supported by identifiable and verifiable evidence that is less than five years old

- a) At the date you distribute a copy you must have identifiable and verifiable evidence\* that:
  - i. supports the individual's name, job title/function (as appropriate) and address details.
  - ii. proves explicitly that the individual meets the Terms of Control.
  - iii. is less than five years old.

### \*Identifiable and verifiable

You must be able to **identify** (for any particular individual or information relevant to the claim) when and from where the information was obtained. *For example: The date plus whether it was obtained:*

- From a direct communication with the individual or a colleague (e.g. online form, event registration, telephone call); or
- From another organisation/operation, such as a Data Broker, Event Organiser or list specialist.

We must be able to **verify** to our satisfaction that the relevant information has been obtained either directly from the individual or from a colleague or other organisation/operation and can be relied upon in support of the claim. *This may require us to contact some individuals/colleagues and/or examine relevant records, such as campaign instructions, orders, invoices and/or payments as we consider appropriate.*

## 4. Copies may be requested or non-requested

The following additional requirements apply only if you choose to optionally breakout your controlled circulation claim into requested and/or non-requested circulation:

### Individually requested

- a) The copy must be addressed to the individual by name.
- b) You must have identifiable and verifiable evidence that the individual has, within the last five years, made a clear request to receive the publication before you send it to them.

**Company requested**

- c) The copy must be addressed to the individual, either by name or job title/function.
- d) At the date you distribute the copy you must have identifiable and verifiable evidence that another employee or colleague from the individual's company or organisation has, within the last five years, made a clear request to receive the publication on the individual's behalf.

**Non-requested (either by name or by job title/function)**

- e) The copy must be addressed to the individual, either by name or job title/function.
- f) For by job title/function copies you may add a stylized/generic job title/job function to the address of an organisation for which you have identifiable and verifiable evidence of the organisation's name and address providing:
  - i. The job title/ job function could reasonably be expected to relate to an individual in that organisation.
  - ii. Multiple or similar job titles/ job functions at the same organisation are not used in a way that might result in copies being distributed to the same individual.

**REPORTING**

You will report controlled free circulation as follows:

- 1. By print and digital copies, by total average controlled free over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland
  - b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

- 2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions. Note: There is no mandatory requirement to breakout Controlled Copies into individual requests, company requests or the non-requested types.
- 3. If your claim includes any controlled circulation copies you will report the applicable Terms of Control.
- 4. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## FREE COPIES

### Free Requested [Print/Digital]

#### DEFINITION

A single free copy requested by and distributed to a known individual.

#### PRINCIPLES

1. **Single copy per issue, distributed to a known individual**
2. **Individual has personally requested to receive the publication**

#### REQUIREMENTS

1. **Single copy per issue, distributed to a known individual**
  - a) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
    - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
    - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
  - b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
    - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
    - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
    - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a route to market that is operated by a third party or partner operation under the following conditions:
      - You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
      - You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
      - We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Free Requested and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
      - You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
  - d) You cannot claim distribution of back issues (with the exception of repurposed unsold retail copies – see below).

#### **Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.
- ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.

**2. Individual has personally requested to receive the publication**

- a) You must have identifiable and verifiable evidence that the individual has, within the last five years, made a clear request to receive the publication before you send it to them.

## REPORTING

You will report free requested as follows:

1. By print and digital copies, by total average free requested over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland
  - b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions.
3. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## FREE COPIES

### Non-Controlled Free [Print/Digital]

#### DEFINITION

Single copies distributed to individuals or organisations.

#### PRINCIPLES

##### 1. Single copy per issue, distributed to an individual or organisation

#### REQUIREMENTS

##### 1. Single copy per issue, distributed to an individual or organisation

- a) You must be able to demonstrate the copy is distributed to the individual. For a digital copy:
  - i. You must be able to demonstrate distribution either by the copy being delivered to a consumer or the consumer being notified of the availability of the issue to access.
  - ii. If distribution/notification is by email, you must exclude Hard Bounces (non-delivery notices typically measured up to 24 hours after being sent).
- b) You must retain a list of individual recipients for one designated issue each reporting period (the Audit Issue - see General Principles and Record Keeping section). In addition, you must be able to recreate a list for any issue in the reporting period on request. Note:
  - i. The list is to include details of the recipients of individually distributed print and digital copies across all circulation types, excluding those that are not available due to the nature of a third-party supplier relationship or represent a duplicate print copy or a duplicate digital copy to the same individual (which are ineligible for claiming).
  - ii. You must be able to identify the circulation category/type each copy is claimed in, and which copies, if any, represent a print and digital copy for an issue that are circulated to the same individual.
  - iii. We may agree to waive this requirement where you use a bespoke distribution process involving a new route to market that is operated by a third party or partner operation under the following conditions:
    - o You are not able to provide a mailing list because the third party/partner operation responsible for the data will not/cannot provide it for the purposes of the audit.
    - o You do not provide to the third party/partner operation details of specific individuals that should receive a copy of the publication under their process.
    - o We are able to review the third party/partner's operation and distribution system and satisfy ourselves that the copies meet the definition and principles of Controlled Circulation and that there is not likely to be a significant level of duplication of a particular issue to individuals through this distribution process. [Note: individuals distributed to under this process need not be tested for duplications against copies distributed outside of the process].
    - o You notify us that you are claiming copies that utilise these requirements in order that we can plan appropriate verification work.
- c) You cannot claim distribution of back issues (with the exception of repurposed unsold retail copies – see below).

#### Repurposed unsold retail copies

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.

- ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.

## REPORTING

You will report non-controlled circulation as follows:

1. By print and digital copies, by total average non-controlled over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland
  - b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions. Note: There is no requirement to break out Non-Controlled copies into by name or not by name types.
3. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## FREE COPIES

### Free Pick Up [Print only]

#### DEFINITION

Copies distributed to known distribution points for pick up or receipt by consumers.

#### PRINCIPLES

1. **Prior notification of distribution details to ABC**
2. **Copies are distributed to known distribution points and made available for pick up or receipt by consumers**
3. **Quantity claimed should not exceed potential demand by the intended consumers**
4. **Effective management controls over distribution**

#### REQUIREMENTS

1. **Prior notification of distribution details to ABC**
  - a) You must inform ABC before the distribution of the first issue for which you intend to claim Free Pick Up, including the following information:
    - i. Details of how, when and where the copies will be distributed
    - ii. A list of all distribution points
  - b) You must, on an on-going basis, be able to provide ABC, on request, details of current and historical distribution points, quantities and distribution dates.
2. **Copies are distributed to known distribution points and made available for pick up or receipt by consumers**
  - a) A distribution point is defined as an agreed location at which copies are handed to or left for pick up by the consumer.
    - i. The distribution points claimed must be consistent with the overview description.
    - ii. ABC must have the right to visit or contact distribution points for verification purposes.
  - b) You must be able to provide evidence, from the third party responsible, of the number of copies of the publication made available for pick up or receipt at each distribution point by consumers. Note:
    - i. Where the copies are made available for pick up or receipt at distribution points by drivers/distributors that are not 3rd party to the publisher (such as in-house distributors or from a joint venture), it may be possible to include these in the claim as long as:
      - It can be demonstrated that the drivers/distributors have sufficient independence and are specifically contracted to deliver/distribute the publication.
      - The auditor/ABC has full and unrestricted access to the relevant parties' documentation and financial records.
      - ABC has specifically agreed this distribution method.
    - ii. In the case of retail customer magazines, it may be acceptable for the publication to be distributed through the same distribution system from central/area warehouse to individual retail outlets as the retailer's other goods and use associated documentation to support a gross distribution claim and EPOS reports for net distribution, if applicable. A retail customer magazine is defined as a publication which:
      - Is published by or on behalf of a retailer
      - Is targeted at customers of that retailer
      - Is supplied to the retailer's own outlets for distribution in store

- iii. In the case of copies distributed to third party distributors for onward distribution to airlines (for airplanes and/or lounges), trains or ships:
  - Copies may be claimed as gross distribution providing ABC is given full and free access to the distributor's contractual arrangements, invoices and documentation to enable verification of the onward supply.
  - The gross distribution claim must be restricted to the quantity verified as onwardly distributed to the airlines, trains or ships and not the quantity supplied to the distributor.
- iv) In the case of copies that are not distributed solus but are packaged with other free or paid publications, inserted in other publications or in goody bags you must be able to demonstrate the copies are distributed using that mechanic. *This may include providing evidence of insertion, packaging, sales etc. We recommend you contact us for advice on evidence required.*
  - If free copies are distributed via a retail multipack with a paid publication the claim should be restricted to the paid publication's net sale. If at the time you submit your circulation claim unsold copies could still be returned or reported you must make an estimate of the final net sale. You must adjust your claim in the following period to reflect any difference between the estimated net sale and the actual net sale.
- c) Where your Free Pick Up claim is for the net number of copies picked up or received by consumers at a distribution point, you must be able to provide evidence of the number of copies returned/not picked up at each relevant distribution point. *Note: This must be on a 'session' basis. For example, a hand merchandiser who goes out first thing in the morning and then again after lunch with a new supply of copies must sign separately for the morning and afternoon supply and returns.*
- d) You cannot claim distribution of back issues, with the exception of:
  - i. copies distributed overseas, where copies may be claimed providing they are distributed within the relevant on-sale period for the current issue for the territory concerned.
  - ii. repurposed unsold retail copies – see below.

**Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.
- ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.

**3. Quantity claimed should not exceed potential demand by the intended consumers**

- a) Your Free Pick Up claim must be reported, as a minimum, as follows:
  - i. **Daily publications (except copies distributed airside, on trains or ships):** On a net basis (i.e. those made available less copies not picked up by consumers).
  - ii. **Non-daily publications and copies distributed airside, on trains or ships:** On a gross (i.e. supply) basis.
  - iii. In the case of copies distributed to third party distributors for onward distribution to airlines (for airplanes and/or lounges) and trains or ships:
    - o Copies may be claimed as gross distribution providing ABC is given full and free access to the distributor's contractual arrangements, invoices and documentation to enable verification of the onward supply.
    - o The gross distribution claim must be restricted to the quantity verified as onwardly distributed to the airlines, trains or ships and not the quantity supplied to the distributor.
- b) As an option you can report copies distributed in a public place (either by hand merchandiser or via distribution bins) on a net basis as long as:
  - i. There are 1 or more distinct Distribution Cycles, each cycle being completed within 24 hours.

- ii. For each distinct Distribution Cycle, you have third party evidence of the net distribution (i.e. those made available and actually collected/handed out).

**4. Effective management controls over distribution**

- a) The publisher is responsible for ensuring that the copies they claim have been delivered and if applicable returns/copies not picked up are accounted for. This requires a publisher to have appropriate management controls and processes in place to ensure that this is happening.

**REPORTING**

You will report Free Pick Up as follows:

- 1. By print copies, by total average Free Pick Up over the period, by geographical type:

- a) United Kingdom and Republic of Ireland
- b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

- 2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions.
- 3. If your publication's total average Free Pick Up claim represents 20% or more of the total average circulation for the reporting period, you must analyse the quantity by the following distribution point types:

- a) Airports, airlines, international rail
- b) Cruise ships / ferries
- c) Trains / other travel points
- d) Hotels
- e) Retail outlets
- f) Food and drink outlets
- g) Street
- h) Educational establishments
- i) Medical establishments
- j) Offices
- k) Leisure centres / clubs
- l) Events
- m) Other publication insert
- n) Other

- 4. A verifiable overview description of the Free Pick Up claim.
- 5. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## FREE COPIES

### Free Retail Voucher [Print only]

#### DEFINITION

Single copies obtained free from a retailer by a consumer by means of a voucher.

#### PRINCIPLES

1. **Free single copies are supplied to the consumer through retailers via the redemption of a voucher**
2. **There must be an auditable incentive for only those vouchers redeemed by the consumer to be reported to the publisher**

#### REQUIREMENTS

1. **Free single copies are supplied to the consumer through retailers via the redemption of a voucher**
  - a) The voucher must be published in another publication.
  - b) Copies can only be claimed if redeemed through retailers where the publication is normally sold.
  - c) You must be able to provide evidence of the number of vouchers redeemed at retailer level and wholesaler level (if applicable).
2. **There must be an auditable incentive for only those vouchers redeemed by the consumer to be reported to the publisher**
  - a) If the voucher is made available to the consumer through another publication on retail sale, the relative retail margins must not incentivise the retailer to redeem vouchers without selling that publication. You must therefore make available to ABC the retail and wholesale margins of the publication supplied free and the publication carrying the voucher.

#### REPORTING

You will report Free Retail Voucher Copies as follows:

1. By print copies, by total average Free Retail Voucher copies over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland.
  - b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions.

## FREE COPIES

### Free Letterbox [Print only]

#### DEFINITION

Copies delivered to round level intended for onward letterbox distribution to known addresses.

#### PRINCIPLES

1. **Prior notification of distribution details to ABC**
2. **Copies are delivered to round level intended for onward distribution as single copies through letterboxes in the round**
3. **Effective management controls over distribution**

#### Requirements:

1. **Prior notification of distribution details to ABC**
  - a) You must inform ABC before the distribution of the first issue for which you intend to claim free letterbox, including the following information:
    - i. A list of all distribution rounds, with the number and details of addresses intended for free letterbox distribution
    - ii. Details of how the distribution will take place, including the type of distributors employed and the basis, i.e. individual distributors; third party teams etc
    - iii. The controls over the distribution, including processes for complaints of non-delivery.
  - b) You must, on an on-going basis, be able to provide ABC, on request, details of current and historical distribution rounds and the distributors used.
  - c) You cannot claim distribution of back issues. (with the exception of repurposed unsold retail copies – see below).

#### **Repurposed unsold retail copies**

Repurposed unsold retail copies are print copies supplied to wholesale/retail for retail sale, but which have been returned unsold and are subsequently sold or distributed in accordance with these standards. For the avoidance of doubt, these copies cannot be claimed more than once.

You may claim back issues of repurposed unsold print retail copies as follows:

- i. Issues up to 12 months old against the issue current at the time of sale/distribution.
- ii. The level of repurposed copies included in your claim must be reported – see the Reporting section below for details.

2. **Copies are delivered to round level intended for onward distribution as single copies through letterboxes in the round**
  - a) Distribution should be made to the known addresses within a round.
  - b) Copies can be distributed to multiple-residential units (e.g. A single building converted into two or more flats) providing:
    - i. Distribution is made to an area where access is restricted to residents of the multiple residential unit. *For example, through a communal or secure letterbox as opposed to distribution to a lobby area accessible by the general public.*
    - ii. The number of copies claimed for a multiple residential unit is the number of copies distributed into that unit limited to the number of households, up to a maximum of 10.
  - c) ABC must have the right to contact addresses and distributors for verification purposes.

- d) You must be able to provide evidence of the number of copies of the publication that has been received by the distributor, team leader or contract distributor who is engaged to deliver them to the addressees in the round(s). If the receipt is for more than one round, then it must be clear that this is the case, and each round identified.
- e) You may use different types of distributors, as follows;

**Distributors:** - A distributor is a named individual who is allocated a round or rounds and delivers the publication in person to the addresses.

You must keep:

- i. A list of the names and addresses of all distributors involved in the delivery of each issue, that identifies for each distributor:
  - The rounds they have covered
  - The number of copies they have delivered
  - The amount(s) they have been paid
  - The method of payment
- ii. Financial records that support individual and total payments to each distributor (for example purchase ledger records and bank statements). In addition:
  - Cash payments must be evidenced by a signature of the person handing the payment over (e.g. Driver, Team Leader)
  - Payments for leaflet deliveries and other expenses must be shown separately

**Teams:** - A team is two or more people who deliver the publication under the control of a Team Leader. Teams are used to deliver to a group of rounds which have not been allocated an identifiable distributor.

You must:

- i. Verify the identity of Team Leaders
- ii. Identify for each issue those rounds delivered by teams
- iii. For each issue:
  - Keep a list of the names and addresses of team leaders and team members
  - The rounds they have covered
  - The total papers delivered
  - The amount(s) they have been paid
- iv. Have financial records (for example purchase ledger records, invoices and bank statements) that show you have paid for the team deliveries

**Contract distributors:** - A contract distributor is an external company that you have contracted to deliver the publication. *If you use a contract distribution company that is a subsidiary or associated company of your company (or your publishing group) then this section does not apply, instead you should refer to either distributor or teams whichever is appropriate.*

You must:

- i. Retain responsibility to report the distribution figures and make sure the required records to support the distribution claim are available (whether at your offices or those of your contractor).
- ii. Be able to provide invoices from the contract distributor and evidence that these have been paid.

### 3. There will be effective management controls over distribution

- a) If your systems and controls indicate any apparent failure in the scheduled distribution then the copies affected must not be claimed.
- b) You must keep up to date records for each and every round. The records must detail the addresses that you plan to deliver to. You should ensure that historical records are available for each issue in the Reporting Period.

The records must:

- Clearly define the boundaries of the distribution area
- Identify which postcode sectors are covered
- Identify any areas within the boundaries that are not delivered to
- Detail the streets and roads covered by individual distribution rounds and any exceptions.

- Contain instructions to identify any households within the round that are not to be delivered to
  - Allow the distribution rounds to be referenced to the appropriate payment records
  - Be updated within a month of any change to the distribution area, postcodes covered or distribution rounds. The dates and detail of any changes to rounds must be recorded.
- c) It is good practice to maintain a record of complaints of distribution failings. These can arise from a variety of sources ranging from addressees not receiving a publication to discrepancies identified from your own processes. Your records should be kept in a uniform way, noting the complainant the nature of the complaint, and the actions taken, including any amendments to your claim.
- d) If you use a contract distributor we will require them to have effective distribution controls and reporting in place. Scrutiny of these should be available to your auditor and ABC.

## REPORTING

You will report Free Letterbox as follows:

1. By print, by total average Free Letterbox over the period, by geographical type:
  - a) United Kingdom and Republic of Ireland.
  - b) Other Countries

It will be reported on the ABC Certificate combined with the other Free Circulation categories into a total average Free Circulation, by print and digital copies, and by geographical type.

2. It will also be reported on the ABC Certificate as part of a summary analysis showing for each free circulation category, a total print and digital combined figure, across all geographical regions.
3. If you have claimed repurposed unsold retail copies, then you must combine the repurposed copies with any other repurposed copies in other categories and report the total as a percentage of the total average circulation for the reporting period.

## EDITIONS

### DEFINITION

An Edition is a version of an issue of the publication that varies from the Main Edition (the UK and/or ROI version that has the largest circulation), usually for reasons of geography, timing or content. How it has varied from the Main Edition will affect how or whether it can be included on the same ABC Certificate.

### PRINCIPLES

1. An Edition must be in keeping with the overall issue to be reported on the same ABC Certificate
2. Changes to an Edition may require a breakout on the ABC Certificate

### REQUIREMENTS

1. An Edition must be in keeping with the overall issue to be reported on the same ABC Certificate
  - a) The Edition must carry a logotype/masthead incorporating the generic name of the Main Edition.
  - b) The branding and appearance of the Edition must be sufficiently similar as to be considered the same product as the Main Edition. For the avoidance of doubt a change in format alone (such as a change in publication size) will not infringe this requirement.
  - c) The Edition must carry the same cover date/issue identification as the Main Edition.
  - d) The Edition must be published and distributed on or about the same date as the Main Edition.
  - e) Additionally, digital copies:
    - i. Must be published electronically as a unit (For the avoidance of doubt, a website cannot be reported as an edition of the publication).
    - ii. May be reformatted to suit the different delivery medium. *For example: changes in page size or order.*
    - iii. May include may include electronic enhancements to editorial or advertising to take advantage of the medium. *For example: pictures replaced with video, include live social media or news feeds.*
    - iv. Must be audited by ABC Staff Auditors. You must provide us with free access to digital copies on request.

You are requested to register your intention to claim digital copies in advance of your first claim, as we may carry out audit work during the reporting period.

2. Changes to an Edition may require a breakout on the ABC Certificate
  - a) Where there are any advertising changes, you must report the total average circulation for that Edition, which will appear on the Certificate.

Note:

- Advertisements are defined as all advertising including ROP, display, classified and advertorials.
- Advertisements that have been changed in the Edition but are from the same advertiser are treated as appearing in the Edition for this purpose.
- Advertising changes are ignored for ABC purposes if:

- They are made solely because their inclusion would, in the opinion of the publisher, the advertiser or their agency render the publication illegal in a particular territory. Note: This opinion must be judged reasonable by the auditor and ABC.
  - The advertisement has changed but it is the same advertiser.
  - They're included in a wrap around ('wrap') that would be considered additional to, and therefore not part of the magazine.
- If you do need to breakout an Edition then the Main Edition will be broken out as well.

## ISSUES TO BE INCLUDED/EXCLUDED

### DEFINITION

All published issues for which the majority of the distribution took place within the Reporting Period must be included except for any issues allowed to be excluded according to this section.

### PRINCIPLES

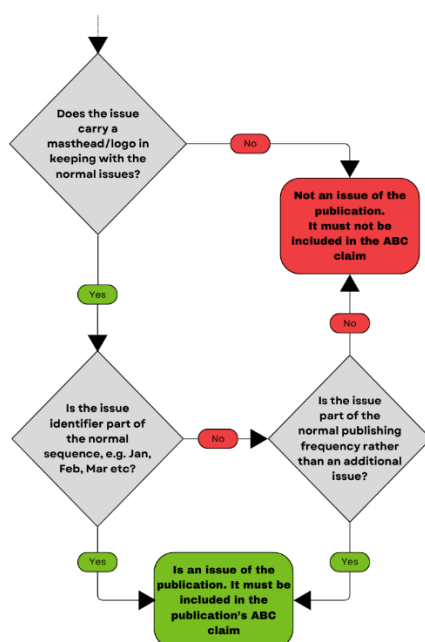
1. All issues published in the Reporting Period must be included
2. Published issues that are allowed to be excluded according to this section may be removed from the average circulation figure
3. Issues allowed to be excluded from the average circulation figure will be reported

### REQUIREMENTS

1. All issues published in the Reporting Period must be included
  - a) Whether an issue is included in the Reporting Period is determined by the date by which 50% of the claimed distribution is distributed/made available. For each component of distribution the date distributed/made available is determined as follows:
    - i. Mailed copies: The date the copies enter the distribution chain, i.e. when they are posted or delivered to a courier.
    - ii. Paid copies: The first date the copies are made available to the consumer, i.e. for retail sales the first official on sale date.
    - iii. Copies made available for pick up by consumer: The date the copies are made available/handed out to the consumer.
    - iv. Free Digital Copies: The date email notifications are sent.

Note: If the date by which 50% of an issue's distribution is distributed/made available is close to the end of a Reporting Period, you may contact us for advice on how to report the issue.

- b) Use the following flowchart to determine if an issue must be included in the publication's ABC claim:



**2. Published issues that are allowed to be excluded according to this section may be removed from the average circulation**

- a) There are certain circumstances under which you may exclude an issue from the reported circulation. The circumstances and information surrounding any exclusion are subject to audit.
- b) **ABC granted exclusion:** You may exclude an issue for which we have issued an exclusion note. You can apply for an ABC granted exclusion if:

- i. Due to circumstances outside your control:

- The distribution of an issue fails to achieve the planned level of distribution and that shortfall is greater than 10% of the planned distribution\*\*; or
- The planned level of distribution is achieved but is severely delayed or withdrawn prematurely from sale, resulting in a shortfall in the Actively Purchased sale\* and that shortfall is greater than 10% of the average of the previous four issues' actively purchased sales figures\*.

\* (print and Digital Copies combined)

\*\*If there is a potential event, about which you have advance notice and that you reasonably consider has a strong possibility of curtailing the planned distribution of an issue by greater than 10%, then you may apply to exclude that issue, with an appropriate reduction in print quantity to account for that expected reduction in distribution. This is to avoid the commercial and environmental cost of printing copies that you do not consider will ever be distributed. Please submit the exclusion application in these circumstances ahead of your print order, in order that we can confirm if it's approved or not before you commit. You should be able to:

- 1. Demonstrate, with reference to previous issues, that the initial planned level of distribution declared is bona fide; and
- 2. Provide evidence of the potential event that threatens disruption to your distribution.

- ii. You submit your application to us using an ABC Exclusion Note Request Form.

If we do not issue an exclusion note we will issue a rejection notice detailing the reason for rejection

**3. Issues allowed to be excluded from the average circulation figure will be reported**

- a) Any issues excluded from the reported circulation will be reported on the Certificate.

## REPORTING

You will report the following which will be reported on the ABC Certificate:

- 1. Number of issues included in the circulation claim.
- 2. Details of any issues excluded from the circulation claim, including for each:
  - a) The general reason for exclusion.
  - b) The total net circulation.

## REPORTING PERIODS

### DEFINITION

Each ABC Certificate has a defined Reporting Period which identifies the date or dates it covers.

### PRINCIPLES

1. You must report a continuous series of Reporting Periods on a mandatory frequency
2. You can report optional shorter Reporting Periods

### REQUIREMENTS

1. You must report a continuous series of Reporting Periods on a mandatory frequency
  - a) Once we have issued a publication's first ABC Certificate for a mandatory reporting period we must continue to issue Certificates for subsequent consecutive mandatory Reporting Periods (i.e. so there is no gap in certification) while the publication remains registered.
  - b) The mandatory Reporting Period will be one of the following:
    - i. 12 months, 1<sup>st</sup> January to 31<sup>st</sup> December
    - ii. 6 months: 1<sup>st</sup> January to 30<sup>th</sup> June and 6 months, 1<sup>st</sup> July to 31<sup>st</sup> December
    - iii. Monthly: calendar months
    - iv. For annual publications (1 issue per year) the distribution period (the entire date range over which the claimed copies have been distributed) or a single principal distribution date (the date by which more than 50% of the claimed distribution has occurred).
  - c) Changing the mandatory frequency, if possible, is expected to be infrequent. We reserve the right to reject or impose conditions on requests to change frequency if in our view this might affect transparency or comparability.
  - d) If in our opinion there are exceptional changes to a publication during the Reporting Period that mean issuing a Certificate for the mandatory Reporting Period in full might lead to confusion or a lack of transparency in the data certified, then we may agree or require the issue of more than one Certificate covering the mandatory period. *For example, if a publication changes from a paid circulation model to free circulation during the period then one Certificate could be issued up until the point of change and one from that point to the end of the mandatory Reporting Period.*
2. You can report optional shorter Reporting Periods
  - a) Optional Reporting Periods are whole months or any number of whole months in addition to mandatory Reporting Periods. Note: A month is a calendar month.
    - i. You can report an optional single issue with the condition that you must then also report to the next 6-month mandatory period end (i.e. to 30<sup>th</sup> June or to 31<sup>st</sup> December).
  - b) For newly registered publications only:
    - i. You can report single issues until the start of the next month.
    - ii. You can report one or more consecutive optional Reporting Periods (i.e. there is no gap in certification) before reporting your first mandatory Reporting Period.

## OPTIONAL REPORTING

### INTRODUCTON

You may request to report additional information via ABC to enhance the promotion or messaging relevant to your publication or your wider brand.

Information or data related to publication may be reported on the publication's ABC certificate. Information or data related to the wider brand or group may be reported via a Brand or Group Report (please see separate Reporting Standards for these).

Please contact us to discuss the details of the additional data you wish to report, including how the claim may be submitted and associated additional audit costs.

### REQUIREMENTS

Information or data you may opt to report on your publication's certificate, includes:

- a) Analyses derived from (or closely connected with) data reported on the certificate. This will be subject to the data being, in our opinion:
  - i. Auditable
  - ii. Clear (terms defined or explained as appropriate)
  - iii. Related to the product being certified
  - iv. Albeit reporting different information, is in keeping with the requirements for data and evidence in relation to the current Reporting Standards. *For example: if the breakout is an analysis of subscription bundles, we would expect the evidence levels to be in line with that already in place for subscriptions.*
- b) Publication Active Views (PAVs) - please refer to separate section
- c) Geographical Analysis - please refer to separate section

## PUBLICATION ACTIVE VIEWS [Digital only] – Optional

### INTRODUCTON

You may opt to report digital copies using the metric Publication Active Views (PAVs). This could be:

- a) In addition to print and/or digital copy circulation on a single certificate.
- b) As a separate product in its own right, with or without any circulation reported, on a separate certificate.

As a separate and distinct metric, PAVs will not be incorporated into, or aggregated with circulation in ABC certificates or reports.

Please contact us to discuss requirements and costs as soon as possible, should you wish to consider reporting PAVs, as we will need time to inspect your systems and assess their suitability for audit.

### REQUIREMENTS

1. A Publication Active View is a single copy of a publication actively opened by a device for viewing, adhering to the following principles:
  - a) A minimum of one page of an issue (or a day) opened/served on/to a device.
    - i. A device may make a number of active views of an issue (or day), either together or at different times. Only one active view per device per issue (or day) can be claimed and reported.
    - ii. You must be able to provide evidence of active views by browser
  - b) Distinct action/event by the end user to view.
    - i. Note: a single action/request which results in both the content being downloaded/made available and the automatic opening of a page of the publication is not considered a distinct action/event. A further distinct action would be required such as opening a second page.
  - c) The view request must be on an issue by issue (or daily) basis.
2. If you're reporting PAVs on a certificate alongside circulation, then the digital copies for which you're reporting PAVs must:
  - a) Be in keeping with the overall issue to be reported on the same ABC. Please refer to the Editions section.
  - b) Be published and available to the end user.
  - c) If accessed on a web site be restricted either by a "pay wall" or a "registration" gateway with a password requirement. This does not prevent digital copies from including links to free to access website content.
3. If you're reporting PAVs on a certificate without circulation, then the digital copies must:
  - a) Be edited, designed, and contain date-stamped content - it is not a website.
  - b) Be published and available to the end user.
  - c) Be published periodically on a regular and known frequency. e.g. 6 days a week/weekly/monthly etc.
    - i. If there is not an identifiable and regular publishing frequency then the period of measurement will not be per issue, but will default to the number of days the publication is available. i.e. if available every day then the number of days would be 365 per year (366 in a leap year): or if only available on Sundays then the number of days per year would be 52. Where this is the case the rules will refer to 'daily' in parenthesis.
  - d) Be presented in a navigation format such that the publication is divided into defined pages of content presented together.
  - e) If accessed on a web site be restricted either by a "pay wall" or a "registration" gateway with a password requirement. This does not prevent digital copies from including links to free to access website content.

- f) All be branded in common, if there are different editions
4. Advertising (by advertiser) must be common within a PAV edition, and once published remain unchanged (except for dynamically served advertising).
    - a) If non-dynamically served advertising (by advertiser) changes or there is a version not carrying advertising, this constitutes a different edition and the PAVs for each edition must be broken out on the certificate.
    - b) You may opt to report Total Edition Active Views, which is the unde-duplicated total of the reported Publication Active Views of all applicable editions (i.e. not de-duplicated by device). To be included in the Total Edition Active View figure, the edition must:
      - i. Be issued at a known and regular time.
      - ii. Remain available to the user with all other editions.
      - iii. Contain some new editorial compared to other editions
  5. We will need to check on an ongoing basis that issues (or content) are available for download or view. You must therefore provide us with free access to all issues (or days) and editions of the digital copy.
  6. You may opt to additionally report Publication Downloads, which are a single copy of a publication's content delivered, streamed or downloaded to a device available to read. To be included in a Publication Download figure:
    - a) The whole issue (or content) must be available to read.
    - b) The issue can be either 'pushed' or 'pulled'.
    - c) The issue must be requested by the end user on an issue by issue (or daily) basis or continuous basis.
  7. You may, as an option, make provisions for Publication Active Views that you expect to be made (or receive evidence of) after you have submitted your claim. Please note:
    - a) Provisions can only be made for digital copies that have identifiable issues.
    - b) The estimated Publication Active Views must be based on a reasonable assessment of information such as historic levels, seasonal trends or other market information.
    - c) You must adjust your claim in the following period to reflect any difference between the estimated and the actual figures.
    - d) If you make a provision for Publication Active Views you must also make an appropriate provision for any related metrics. For example: If you choose to make a provision for Publication Active Views, and you also report Total Edition Active Views, then you must make a provision for both metrics.

## REPORTING

1. You can choose to report monthly, 3-monthly, 6-monthly or 12-monthly on a continuous basis.
  - a) The periods may either follow calendar months or the equivalent dates for the relevant months according to the published ABC Accounting Calendar (i.e. allowing the period to include only whole weeks, starting on a Monday and ending on a Sunday).
  - b) If you're reporting PAVs on a certificate alongside circulation, then the period (by months) must align with the circulation months reported (but can be by the Monday to Sunday date basis).
2. You will report the following, which will be broken out on the certificate:
  - a) Average total PAVs per issue (or day) in the Reporting Period.
  - b) Total PAVs per issue (or day).

- c) For each edition (if applicable), average total PAVs per issue (or day).
- d) The number of issues published in the period, or if there is not an identifiable and regular publishing frequency then the number of available days will be reported along with a note to that effect.
- e) A statement detailing how advertising is served (e.g. static and/or dynamic) and a statement detailing if there is an edition not carrying advertising.

## GEOGRAPHICAL ANALYSIS - Optional

### DEFINITION

The Geographical Analysis is an optional breakout of the circulation into geographical locations.

### PRINCIPLES

1. Publishers may optionally report a Geographical Analysis
2. The circulation is analysed into standardised geographical locations

### REQUIREMENTS

1. Publishers may optionally report a Geographical Analysis
  - a) You may report a Geographical Analysis as an optional table on the Certificate.
  - b) You may report a bespoke analysis that is relevant to your publication (subject to the conditions set out in the Optional Reporting section) or use our templated versions as set out below.
2. The circulation is analysed into standardised geographical locations
  - a) The Geographical Analysis is a census of the analysed data (i.e. not sample based and no extrapolation).
  - b) You may select the level of detail to which you analyse copies, with the ability to mix different levels from the following:
    - i. World Region. *For example: Europe, North America, Asia*
    - ii. Country. *For example: United Kingdom, Ireland, Germany*
    - iii. UK Region. *For example: East Anglia, East Midlands*
    - iv. UK Counties. *For example: Cambridgeshire, Dorset*Details of the World Regions, Countries and Counties that can be analysed are available on the ABC website.
  - c) You may analyse copies as 'Other', which will have a distinct definition (i.e. 'none of the above'), and which you must be able to prove the categorisation. *For example: United Kingdom 3,879 broken out into London 3,100 and Other 779 (being UK but not London).*
  - d) If you cannot prove a copy's categorisation or choose not to analyse it in a geographical category then it will be reported as 'Not analysed'.

### REPORTING

You will report the Geographical Analysis as follows, which will be broken out on the ABC Certificate:

1. By total average circulation over the period; or
2. Your own bespoke analysis as described above.

## RETURN FORM SUBMISSION, AUDIT, CERTIFICATION

### DEFINITION

The Return Form is a submission in which the circulation claim is reported to ABC for certification. Each circulation claim is subject to audit.

### PRINCIPLES

1. **A Return Form must be submitted for the registered product for every applicable Reporting Period**
2. **The Return Form must be submitted by the Submission Deadline**
3. **ABC will issue a Certificate based on the Return Form**
4. **Each circulation claim is audited to verify it is in accordance with the applicable Reporting Standards**

### REQUIREMENTS

1. **A Return Form must be submitted for the registered product for every applicable Reporting Period**
  - a) You must submit a Return Form for the applicable mandatory and optional Reporting Periods you have chosen to report.
  - b) We will advise you how to submit your Return Form. *For example, online via the ABC Return System.* However, if you have not heard from us at the appropriate time please contact us.
  - c) You will submit your Return Form to us, authorised by an appropriate individual representing your organisation.
  - d) If under a legacy arrangement you use a non-ABC Auditor then they must submit the Return Form to us, authorised both by an appropriate individual representing your organisation and your Approved Auditor.
  - e) Whilst our systems contain some arithmetic and logic validation processes, the accuracy of the Return Form remains your responsibility.
  - f) Estimates and assumptions must not be made on the Return Form unless the Reporting Standards allow for them, or we have authorised them.
2. **The Return Form must be submitted by the Submission Deadline**
  - a) We will publicise the applicable Submission Deadline.
  - b) It is your responsibility to ensure Return Forms are submitted by the Submission Deadline. Failure to do so can result in a penalty and/or cancellation of your product's ABC registration under the ABC Byelaws.
3. **ABC will issue a Certificate based on the Return Form**
  - a) We will publish the certified data on our website subject to any timing criteria applicable to the sector. We may also make arrangements to provide our data to be published via commercial data providers and to those who subscribe to our data services.
  - b) Where we first release the circulation figures for publications in an ABC concurrent release of data, we will publicise the date and time of this release and you must not issue or publicise any figures before this release.
  - c) We will confirm when circulation figures not in a concurrent release will become publicly available, normally 5 working days after a draft Certificate has been sent to you.

**4. Each circulation claim is audited to verify it is in accordance with the applicable Reporting Standards**

- a) The audit must be carried out by ABC Staff Auditors, with the exception of those publications for which an Approved Auditor appointed by you and approved by us is already in place as at 1<sup>st</sup> January 2025 (which shall be limited to print claims, excluding Free Pick Up).
- b) Requirements in relation to the auditor and audits will be covered by the ABC Byelaws, ABC Audit Programmes and contractual arrangements.
- c) Publications reporting on a mandatory basis every 6 months may opt for an annual audit. Publications reporting on a mandatory basis every month may opt for a quarterly audit. Known as 'consolidated auditing' this enables the audit work for more than one certificate to be carried out at the same time. Note:
  - i. You must tell us in writing if you wish to use this option.
  - ii. We may withdraw the option to utilise consolidated auditing if certificates are repeatedly re-issued to correct material errors in claims.
- d) We carry out inspections on all publications that are not audited by ABC Staff Auditors. The inspections are carried out by ABC Staff Auditors and all publications will be inspected at least once every two years on average and those publications with a publishing frequency of more than once a week will be inspected annually on average.
- e) If following an audit or inspection we identify material problems with the Return Form or Certificate then we will propose to revise the claim. If a Certificate has already been issued we will issue an updated certificate that identifies the changes. This replaces your original Certificate and must be used in its place. The process is as follows:
  - i. We will send you a letter detailing the reason/problem giving rise to the amendment.
  - ii. You will have 10 working days from the receipt of this letter to provide any further information to us, or object to the revision of the claim.
  - iii. If you wish to object to the revision of the claim you must do this in writing to the Director of Audit who will investigate and provide a decision within 10 working days. If the objection is to a decision by the Director of Audit or the Chief Executive then the first level of appeal will be in accordance with the Review Procedure detailed in the ABC Byelaws.
  - iv. Subsequent Certificates may not be issued until we have resolved all queries on a previous audit and issued the updated Certificate, if applicable.
  - v. We identify updated certificates on our website.